

Coated Fabrics

US Industry Study with Forecasts for 2020 & 2025

Study #3412 | May 2016 | \$5400



Competitive environment motivates players

Participants -- whether coated fabric producers or raw material suppliers -- continue to refine performance characteristics, such as increased durability and improved touchability, in order to remain competitive with alternative materials (e.g., uncoated textiles, chemically treated textiles, and leather). Additionally, improving the environmental profile of coated fabrics remains important. For instance, the polyurethane-coated fabric industry has been shifting from solvent-based to more environmentally friendly waterborne polyurethane coatings as availability grows and performance improves.

Sales determined by performance

Coated fabrics are purchased when certain performance characteristics are required, such as durability, water-proofness, or a leather look. For instance, coated fabrics are chosen for protective apparel, outdoor upholstery, rainwear, or tents when a waterproof or water resistant surface is preferred. In another example, coated fabrics are the only choice for certain airbags -- such as frontal airbags -- where the durability of both the fabric and the coating is key due to rapid inflation rates. In other cases, such as indoor upholstery, and clothing and accessories, coated fabrics are chosen to provide a leather-like look and texture at a lower cost than leather.

Transportation is leading market

The significant size of the transportation (e.g., aerospace, motor vehicle, and marine) industry in the US supports coated fabric demand by enabling a high level of local

production capacity for components that can be made from coated fabrics, including airbags, seating upholstery, covers, and trim. Increases in production levels of these items, as vehicle output continues to expand, will promote coated fabric demand. Furthermore, more coated fabrics are expected to be used on a per vehicle basis, particularly in airbags as more airbags are installed in each vehicle.

Demand driven by expected growth in industrial sector

Demand for coated fabrics will also be driven by an expected increase in the manufacture of industrial products, such as PTFE tape and conveyor belting, which can be made from coated fabrics. In many such industrial applications, coated fabrics are the only viable material due to the performance characteristics they exhibit. In addition, coated fabric demand will benefit from an increase in local production levels of protective clothing. Also, continued improved aesthetics will promote the greater use of coated fabrics as a low cost alternative to leather for upholstery and trim applications.

Study coverage

This study analyzes the US coated fabric market. It offers historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by product, substrate and market. The study also considers key market environment factors, assesses the industry structure, analyzes company market share and profiles 42 US industry players such as Seaman, Saint-Gobain, Canadian General-Tower, Takata, OMNOVA Solutions, Spradling International and Trelleborg.

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Polyester

In 2015, demand for coated polyester fabrics totaled 297 million square yards, or 49 percent of total coated fabric sales. Demand for coated polyester fabrics is expected to grow at a rate of 1.5 percent per year through 2025, driven by the adequate performance of polyester fabrics provided in a range of applications. Polyester fabrics are usually coated with polyvinyl chloride, polyurethane, or other performance additives to provide resistance to chemical and biological attack, abrasion resistance, and the ability to dry quickly. Despite favorable gains, coated polyester's share of total demand in certain markets, such as in medium and heavy duty vehicles, will decline as coated nylon fabrics become more widely used. While polyester is losing market share in certain applications as competing materials continue to emerge and improve, the material's price advantage ensures it will remain a popular choice in many applications for the foreseeable future.

In 2015, over half of demand for coated polyester fabrics was dedicated to the light vehicles, marine and other non-motor vehicle transportation, industrial, and furniture markets. Coated polyester fabrics are the primary upholstery choice in cars, boats, and furniture, as cost efficiency is generally the primary concern in this application. Suppliers of polyester substrates to these markets benefit from the material's low cost as an inexpensive, durable, and easy to care for upholstery that can be embossed to imitate the look of natural leather grain. Other applications include interior trim, sidewalls, and headlining in light vehicles, exterior light vehicle uses such as front end and spare tire covers, convertible tops, and truck covers. However, coated polyester accounts for only a small share of airbag production, a segment still dominated by lighter and thinner nylon fabrics.

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This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

TABLE VI-3

LIGHT VEHICLE MARKET FOR COATED FABRICS (million square yards)

Item	2005	2010	2015	2020	2025
Light Vehicle Production (000)					
sq yds fabric/vehicle					
Light Vehicle Coated Fabric Demand					
By Application:					
Airbags					
Upholstery, Trim, & Accessories					
Upholstery & Sidewalls					
Headlining					
Other Trim & Accessories					
Auto Tops & Light Truck Covers					
By Fabric:					
Coated Nylon					
Coated Polyester					
Other Coated Fabrics					
% light vehicles					
Motor Vehicle Coated Fabric Demand					

Source: The Freedonia Group

TABLE IV-3

VINYL-COATED FABRIC SUPPLY & DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Polymer-Coated Fabric Demand					
% vinyl					
Vinyl-Coated Fabric Demand					
+ net exports					
Vinyl-Coated Fabric Shipments					

Source: The Freedonia Group

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Related Studies

World Nonwovens

Global demand for nonwovens is forecast to rise 5.4 percent annually to 11.1 million metric tons in 2019. Gains will be driven by increasing production of diapers, filters, wipes, medical disposables, and automotive components. Developing world markets will outpace more established areas. This study analyzes the 8.5 million metric ton world nonwovens industry, with forecasts for 2019 and 2024 by web formation process, application, and market for six world regions and 19 major countries. The study also evaluates company market share and profiles industry players.
#3365..... January 2016 \$6300

Industrial Rubber Products

US demand for industrial rubber products is forecast to rise 3.4 percent annually to \$24.4 billion in 2019. Roofing and other products will be the fastest growing segments. Construction and machinery will be the fastest growing markets. Original equipment manufacturing (OEM) demand will outpace maintenance/repair/operations (MRO) sales. This study analyzes the \$20.6 billion US industrial rubber product industry, with forecasts for 2019 and 2024 by raw material, product and market. The study also evaluates company market share and profiles industry players.
#3305..... July 2015 \$5300

Geosynthetics

US demand for geosynthetics is forecast to rise 3.8 percent yearly to 1.3 billion square yards in 2019, valued at \$2.5 billion. Nonwoven geotextiles will remain the dominant product by volume, while geomembranes will grow the fastest from a smaller base. The best market prospects will be in construction and transportation infrastructure. This study analyzes the one billion square yard US geosynthetics industry, with forecasts for 2019 and 2024 by product, market and region. The study also evaluates company market share and profiles industry players.
#3289..... June 2015 \$5300

World Coated Fabrics

Global demand for coated fabrics will rise 4.6 percent per year to 6.5 billion square meters in 2019. The Asia/Pacific region will remain dominant, while the Central/South America and Africa/Mideast regions will grow the fastest from small bases. The dominant polymer-coated fabric segment will outpace rubber-coated types. This study analyzes the 5.2 billion square meter world coated fabric industry, with forecasts for 2019 and 2024 by product and market for six regions and 19 countries. The study also evaluates company market share and profiles industry players.
#3276..... June 2015 \$6300

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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